

DETAILED ACTION

Acknowledgements

1. The following is a Final Office action in response to communications filed on. Claims 1-4, 6-12, 14-20 and 22-24 are pending. Claims 1, 9 and 17 have been amended.

Response to Applicant's Amendments

2. Applicant's amendments to claims 1, 9 and 17 necessitated the new grounds of rejections.

Response to Applicant's Arguments

3. Applicant's arguments with respect to claims 1-4, 6-12, 14-20, and 22-24 have been considered but are moot in view of the new ground(s) of rejection.

Claim Rejections - 35 USC § 103

4. The following is a quotation of 35 U.S.C. 103(a) which forms the basis for all obviousness rejections set forth in this Office action:

(a) A patent may not be obtained though the invention is not identically disclosed or described as set forth in section 102 of this title, if the differences between the subject matter sought to be patented and the prior art are such that the subject matter as a whole would have been obvious at the time the invention was made to a person having ordinary skill in the art to which said subject matter pertains. Patentability shall not be negated by the manner in which the invention was made.

5. Claims 1-4, 6-12, 14-20 and 22-24 are rejected under 35 U.S.C. 103(a) as being unpatentable over Wilkinson et al (US 7016936) and Patel et al (US 7370004) in further view of Carey et al. (US 2002/0112035)
6. With respect to claims 1, 9 and 17, Wilkinson teaches
 - a. interfacing with a plurality of different types of communication channels (column/line 11/40-56);
 - b. receiving requests from at least one customer for customer interactions over at least two different types of communication channels (column/line 4/37-43);
 - c. identifying the at least one customer (column/line 4/46-50);
 - d. wherein grouped rules are processed in a hierarchy (column/line 5/33-37 and 5/61-67),
 - e. where rules are processed by rank or order column/line 6/32-38), where the hierarchy of grouped rules comprises:
 - i. a group of interaction rules (column/line 5/53-58, regarding interaction rules that comprises an interaction motivation plan);

- ii. a group of trigger rules (column/line 12/46-54, regarding actions that are triggered based on a particular condition/states);

Wilkinson does not directly or explicitly teach a channel-independent processing engine for each customer interaction, event based rules or where overriding rules have priority over interaction rules. However, Patel teaches:

- f. for each requested customer interaction, choosing at least one treatment for processing the customer interaction using a central, channel-independent processing engine (column/line 2/35-38); and
- g. processing the customer interaction by the central, channel-independent processing engine, based on the treatments chosen (column/line 3/7-41).
- a. formulating the interaction strategy based on value opportunities, where the hierarchy of grouped rules comprises
 - i. a group of interaction rules (column/line 19/15-24, regarding the data mining of trends/behaviors to make new business rules)
 - ii. a group of event rules (column/line 19/40-50, regarding events that generates personalization rules)

It would have been obvious to one of ordinary skill in the art to include the business system of Wilkinson with the ability to use a channel-independent processing engine for each customer interaction as taught by Patel since the claimed invention is merely a combination of old elements, and in the combination each element merely would have performed the same function as it did separately, and one of ordinary skill in the art would have recognized that the results of the combination were predictable.

Wilkinson in view of Patel does not directly or explicitly teach where overriding rules takes precedence over interaction rules. However, Carey teaches a content experience management system where rules are prioritized and certain rules are allowed to override (i.e. take precedence) other rules (including interaction rules because no rules are excluded) (paragraph 0078).

It would have been obvious to one of ordinary skill in the art to include the business system of Wilkinson and Patel with the ability to use a content experience management system where rules are prioritized and certain rules are allowed to override other rules as taught by Carey since the claimed invention is merely a combination of old elements, and in the combination each element merely would have performed the same function as it did separately, and one of ordinary skill in the art would have recognized that the results of the combination were predictable.

7. As to claims 2, 10 and 18, Patel further teaches the method from claim 1, wherein choosing the at least one treatment is a function of a customer segment, an interaction type and an interaction channel (column/line 3/25-28).

8. Regarding claims 3, 11 and 19, Wilkinson teaches the method from claim 1, further comprising:

- h. inserting data correlating to the at least one treatment into a customer intelligence record (column/line 7/20-33); and

- i. returning the customer intelligence record to one of the plurality communication channels for instructing the channel on the treatments to present to the customer (column/line 12/42-45).

9. With respect to claims 4, 12 and 20, Wilkinson teaches the method from claim 1, wherein the step of choosing at least one treatment accesses a central repository where treatments have been stored by an independent design tool (column/line 10/41-48).

10. As to claims 6, 14 and 22, Wilkinson teaches the method from claim 1, further comprising sending the at least one treatment to one of the plurality of communication channels via a plurality of services (column/line 11/40-56).

11. Regarding claims 7-8, 15-16 and 23-24, Wilkinson teaches the method from claim 7, wherein the step of leveraging insight about customers from analytical models to derive at least one treatment comprises:

- j. extracting customer data for a plurality of customers from at least one database (column/line 11/59-67);
- k. training analytical models to predict customer behavior, wherein the analytical models are trained using the customer data extracted from at least one database (column/line 6/66-7/2, 14/4-13);
- l. gathering the customer interaction results (column/line 7/2-5); and
- m. retraining the analytic models to refine the customer behavior prediction, wherein the analytical models are re-trained using the customer data extracted from at least one database as well as the customer interaction results (column/line 7/10-19; 14/15-25 regarding optimizing the customer behavior models) .

Conclusion

12. Applicant's amendment necessitated the new ground(s) of rejection presented in this Office action. Accordingly, **THIS ACTION IS MADE FINAL**. See MPEP § 706.07(a). Applicant is reminded of the extension of time policy as set forth in 37 CFR 1.136(a).

13. A shortened statutory period for reply to this final action is set to expire **THREE MONTHS** from the mailing date of this action. In the event a first reply is filed within **TWO MONTHS** of the mailing date of this final action and the advisory action is not mailed until after the end of the **THREE-MONTH** shortened statutory period, then the shortened statutory period will expire on the date the advisory action is mailed, and any extension fee pursuant to 37 CFR 1.136(a) will be calculated from the mailing date of the advisory action. In no event, however, will the statutory period for reply expire later than **SIX MONTHS** from the date of this final action.

14. Any inquiry concerning this communication or earlier communications from the examiner should be directed to **BRANDI P. PARKER** whose telephone number is (571) 272-9796. The examiner can normally be reached on Mon-Thurs. 8-5pm.

15. If attempts to reach the examiner by telephone are unsuccessful, the examiner's supervisor, Kambiz Abdi can be reached on (571) 272-6702. The fax phone number for the organization where this application or proceeding is assigned is 571-273-8300.

16. Information regarding the status of an application may be obtained from the Patent Application Information Retrieval (PAIR) system. Status information for published applications may be obtained from either Private PAIR or Public PAIR. Status information for unpublished applications is available through Private PAIR only. For more information about the PAIR system, see <http://pair-direct.uspto.gov>. Should you have questions on access to the Private PAIR system, contact the Electronic Business Center (EBC) at 866-217-9197 (toll-free). If you would like assistance from a USPTO Customer Service Representative or access to the automated information system, call 800-786-9199 (IN USA OR CANADA) or 571-272-1000.

/BRANDI P PARKER/
Examiner, Art Unit 3624

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